

Army AcquiLine Implementation



Fort Hood, TX

28 August 2000



Table of Contents

TABLE OF CONTENTS	2
1. INTRODUCTION	5
1.1 AcquiLine – Customer Request Overview	5
1.1.1 Improving Business Processes	5
1.1.2 Product Overview	5
1.1.3 Overview of Implementation Process	5
1.2 Technical Architecture	7
1.2.1 Local Area Network Specifications	8
1.2.2 Email Server Information	8
1.3 FORSCOM Sites to Use AcquiLine	9
1.4 FORSCOM-level "To-Be" process	9
2. TRAINING	11
2.1 Overview of AcquiLine Training	11
2.2 Training for the Core Team	11
2.2.1 Purpose	11
2.2.2 Content	11
2.2.3 Documentation	11
2.2.4 Core Team Members Trained	12
2.3 Familiarization Sessions for Other Users	12
2.4 Resources for Training	13
2.5 Training for Other/Future Users	13
2.5.1 Considerations for Training	13
2.5.2 Options for Training	13
2.6 Training plan	14
3. SITE STANDING OPERATING PROCEDURES	15
3.1 Purpose of the Site-Level Training/Implementation	15
3.2 Site "As Is" Process	15
3.2.1 "As Is" BPR Process – Installation Supply	15
3.2.2 "As Is" BPR Process – Division and Non-Divisional Supply	16
3.2.3 "As Is" BPR Process – DPW Supply	17
3.2.4 "As Is" BPR Process – Installation Services	18
3.2.5 "As Is" BPR Process – Division and Non-Divisional Services	19

3.3	Site "To Be" Process	19
3.3.1	"To Be" BPR Process – Installation Supply	Error! Bookmark not defined.
3.3.2	"To Be" BPR Process – Division and Non-Divisional Units Supply	21
3.3.3	"To Be" BPR Process – DPW Supply	22
3.3.4	"To Be" BPR Process – Installation Services.....	Error! Bookmark not defined.
3.3.5	"To Be" BPR Process – Division and Non-Divisional Units Services	Error! Bookmark not defined.
3.3.6	"To Be" BPR Process – DOIM Supply (Tier III only) and Services	Error! Bookmark not defined.
3.4	"To Be" Process described and defined.....	Error! Bookmark not defined.
3.5	Reports	26
3.6	Help Desk Strategy.....	26
3.6.1	Help Desk Assistance	26
3.6.2	Documentation Required for Help Desk Assistance:	27
3.6.3	The AcquiLine – Customer Request Help Desk can be accessed from the AMS PD ² Help Desk.....	27
3.7	Available tools for self-sufficiency	28
3.7.1	AcquiLine Menu Help Topics	28
3.7.2	AcquiLine Web Based Support:	28
3.7.3	Purchase Request Quad-Fold.....	28
4.	CONFIGURATION	29
4.1	Connecting to AcquiLine – Customer Request	29
4.1.1	AcquiLine - Customer Request Users	29
4.1.2	PD ² Users.....	29
4.2	Users Participating in the Configuration Session	29
4.3	AcquiLine New User Standards	30
4.3.1	Establishing New User Accounts	30
4.3.2	New User Accounts Timeline.....	31
4.4	Expiring User Accounts	31
4.5	AcquiLine and PD ² Database Configuration.....	31
4.6	PR Numbering Convention	32
4.6.1	Background.....	32
4.6.2	Purchase Request Number Tracking and Renumbering	32
4.6.3	Multiple Line Items on a PR:.....	33
4.6.4	Funding-level.....	33

4.7	PD ² Recipients.....	34
4.8	Groups.....	35
4.9	Routing.....	35
4.9.1	Templates	35
4.9.2	Routing	35
4.10	Windows 2000/Office 2000:.....	36
4.11	FSC Codes for Supply PRs	36
4.12	Upgrade to AcquiLine v4.1.c.....	36
4.13	Ship To Address and Unit Requirements.....	36
4.14	PR Retention	37
5.	CUT-OVER.....	38
5.1	Cut-Over Strategy	38
5.2	Milestones	38
5.3	Agreed-to Cut-Over dates	38
5.4	Proposed Action Items in a semi-sequenced Timeline.....	39
6.	APPENDICES	41
6.1	Routing fundamentals and SOP.....	41
6.1.1	Routing fundamentals.....	41
6.1.2	Proposed Routing SOP	42
6.2	Acronyms	43
7.	ANNEXES	45

1. Introduction

1.1 AcquiLine – Customer Request Overview

This document provides an overview of the *AcquiLine - Customer Request* product, describes the technical and business advantages of adopting this product as the solution to paperless requisition processing throughout the U.S. Army, and documents the Fort Hood *AcquiLine - Customer Request* implementation process. The *AcquiLine* product, developed by American Management Systems (AMS), is targeted at achieving paperless business processes. *AcquiLine* is a web-based product suite that provides access to the Standard Procurement System (SPS) program, called Procurement Desktop-Defense (PD²). The *AcquiLine - Customer Request* module is a direct paperless channel between the requesting agent and a contract organization's PD² database.

1.1.1 Improving Business Processes

Currently within the Army, the process for fulfilling a requirement involves many people. Some automation exists, but loosely integrated systems may introduce data integrity vulnerabilities and processing delays. It has been determined by the Army that the total acquisition process requires a new approach and better systems integration in order to achieve the paperless objective set forth by the Department of Defense (DoD).

American Management Systems (AMS) has developed *AcquiLine - Customer Request* as the primary tool to implement paperless acquisition systems and business processes.

1.1.2 Product Overview

AcquiLine - Customer Request is a direct paperless channel between a requiring activity and the contract organization. Requiring activities create purchase requests (PRs) and attachments for supplies and services directly from a web browser. After creating the PR, users can route it to other *AcquiLine - Customer Request* users in their organization according to locally defined business practices for amendments, funding commitment, and approval. Fully approved PRs are sent directly to the contracting activity's PD² database. Contracting officials then utilize the full power of the Standard Procurement System to fulfill the requirement as submitted, or can route the requirement back to the *AcquiLine - Customer Request* user if further clarification is needed. The *AcquiLine - Customer Request* module also allows customers to view PR status information through a web browser. This customer self-service capability saves the requiring activity and procurement office valuable time.

The AcquiLine User Manual attached as Annex A contains detailed instructions to assist the user in obtaining status of their requirements from the PD² database through AcquiLine.

1.1.3 Overview of Implementation Process

The implementation of *AcquiLine - Customer Request* began with the installation of the product and ends when the users are using the system effectively. In order to ensure the success of the implementation, the Army decided to have an AMS Army *AcquiLine - Customer Request* Implementation Team travel to all *AcquiLine* server sites to assist the site in redefining business

practices and to perform product training and familiarization. A Core Team of representatives from the site was selected by the site in order to facilitate the implementation process.

The decisions that were made by each site Core Team are included in this document. Over a period of two weeks, the Core Team was trained on the product and discussed business practices, future training, and the roll out of *AcquiLine – Customer Request*. The members of the Core Team at Fort Hood are found in *Table 1: The Core Team*.

Table 1: The Core Team

	Member	Title	Org	Phone (DSN)	E-mail (all are @hood.army.mil)
1	Wade Utley	Admin Asst	DCA	2879265	Wade.Utley
2	John Sammis	Info Mgmt Specialist	1114th Signal Battalion, DOIM	287-8274	John.Sammis
3	Randy Kirschner	Budget Analyst	4ID	287-7157	Randy.Kirschner
4	David Martin	4ID IPBO	4ID	288-3293	
5	Zach Thompson	Facilities Engineer	4ID	288-5257	Zachary.Thompson
6	Brockley.Moore	13th COSCOM, G4	COSCOM, G4	287-8869	Brockley.Moore
7	Pamela Thomas	Supply Clerk	DOL, IPBO	288-6076	Pam.Thomas
8	Frank Dowling	Supply Tech	DOL, IPBO	287-3762	Frank.Dowling
9	Clyde Reynolds	Supv, Gen Engr	DPW	287-9813	Clyde.Reynolds
10	Joe Holston	IAPO Mgt Spec	ACSRM	287-3799	Joe.Holston
11	Sandy Childs	Security Specialist	III Corps, G2	287-4706	Sandra.Childs
12	Suzy Henderson	Supply Tech	DPW	288-6285	Susan.Henderson
13	Richard Long	III Corps, G4, SGM	III Corps, G4	288-3188	Richard.Long
14	Guy Hunter	4th Inf GSO	4ID	287-0262	Guy.Hunter
15	Linda Dickey	Budget Analyst	ACSRM	287-0237	Linda.Dickey
16	Ruth McIlvenna	Budget Analyst	ACSRM	287-7339	Ruth.McIlvenna
17	Mary McCauley	Comptroller	13th COSCOM	287-8891	Mary.McCauley
18	John Cox	IPBO	DOL, IPBO	287-6722	John.Cox
19	Jay Glazener	Sup, Eng Tech	DPW	286-6115	Jay.Glazener
20	Maria Martinez	Contract Administrator	CCMD	287-3246	Maria.Martinez
21	Judy Wardlow	System Administrator	CCMD	288-5201	Judy.Wardlow
22	Nolia Lanza	Lead Supply Tech	4th CMMC, 13th COSCOM	287-0884	Nolia.Lanza
23	MAJ Todd Brick	ID, III Corps, G6	III Corps, G6	287-9556	Todd.Brick
24	Doris Williams	Training Tech	Education Svcs Div	287-2819	Doris.Williams
25	John Whilden	GSO Chief	1 CD DMMC	287-4725	John.Whilden

26	Leeann Burke	Contracting Spec	CCMD	287-5457	Leeann.Burke
27	Leonard Mettlach	Supply Tech	CCMD	287-5456	Leonard.Mettlach

1.2 Technical Architecture

AcquiLine – Customer Request is a three-tier application that relies on the proper configuration of hardware components, software packages, and communication methods to perform its application functions. The government has provided the hardware, software, and communication infrastructure necessary to support the installation of the *AcquiLine – Customer Request*. This includes a database server and operating system that conforms to the AcquiLine Technical Requirements; a web server and operating system that conforms to the AcquiLine Technical Requirements; a web browser that conforms to the AcquiLine Technical Requirements; and appropriate network connectivity between the database server and the web server. The standard *AcquiLine – Customer Request* components include the following:

Java Applet Client: Runs the *AcquiLine - Customer Request* application, and provides the graphical user interface, which serves as the primary means by which users insert and retrieve data from the *AcquiLine* database. The applet requires a Java 1.1.4-enabled web browser that has a Java Virtual Machine (JVM). To realize the full functionality of *AcquiLine – Customer Request*, the AcquiLine team recommends the use of Microsoft Internet Explorer version 4.01 or higher.

Web Server: The web server machine is responsible for housing all of the *AcquiLine - Customer Request* application source code that consists of HTML files, Java classes, CGI executables, and email processing executables. Because *AcquiLine - Customer Request* is a Java applet, web server software such as IIS is necessary to provide access to *AcquiLine - Customer Request* application users. It is important to note that the number of concurrent application users will impact the hardware requirements. The memory and microprocessor speed requirements of the web server machine will differ for a site having 25 users versus a site having 250 users. Thus, the hardware requirements listed below reflect minimum resource requirements. With respect to memory and the microprocessor speed, it is suggested that the site increase the server machine resources if the user base is greater than 50 users. Refer to **SizeRight** at <http://AcquiLine.com>.

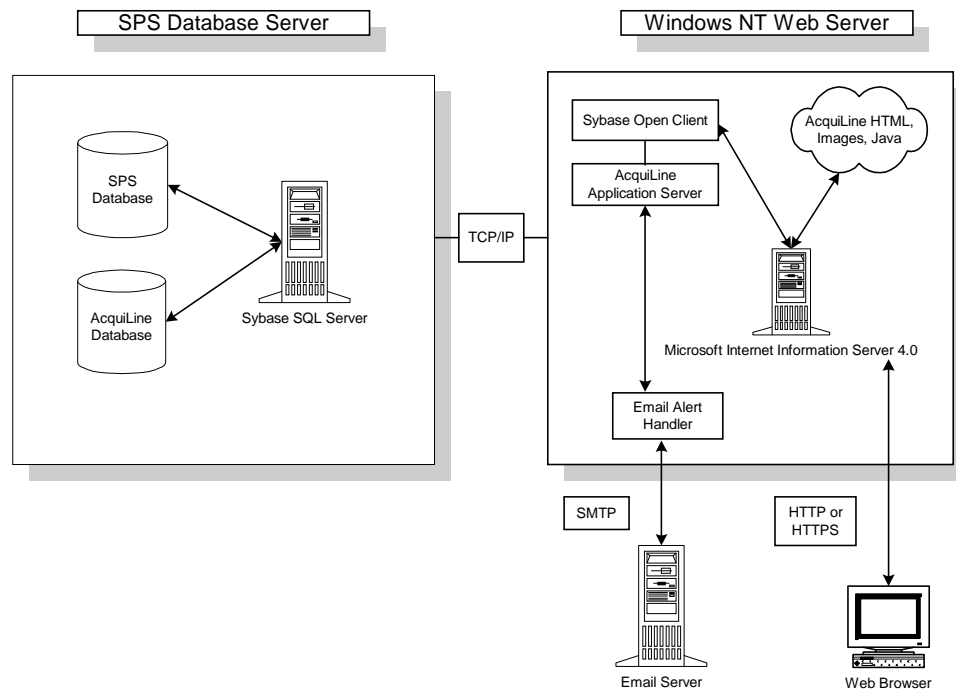
Database Server: The database server machine contains the Sybase SQL server software as well as the SPS and *AcquiLine - Customer Request* databases. It is required that the *AcquiLine - Customer Request* database be installed on the same server as the SPS database.

Alert Poller and Email Handler: Supports automatic notification of *AcquiLine – Customer Request* system events via standard email protocols.

Network and Communications: Enable communication between the Java applet client, database server and web server (e.g., token ring, Ethernet, TCP/IP, etc.). TCP/IP is used at Fort Hood.

The standard *AcquiLine – Customer Request* technical architecture diagram is displayed below in *Exhibit 1: Standard AcquiLine – Customer Request Technical Architecture*.

Exhibit 1: Standard AcquiLine – Customer Request Technical Architecture



1.2.1 Local Area Network Specifications

The *AcquiLine-Customer Request* web server and database server must be connected over a TCP/IP network, allowing direct communication between the two. Likewise, connectivity via Hypertext Transfer Protocol (HTTP) or Hypertext Transfer Protocol Secure (HTTPS) protocol must be enabled between all *AcquiLine-Customer Request* clients and the *AcquiLine-Customer Request* web server.

The existence of a firewall may inhibit web server to database or client to web server connectivity. The appropriate firewall configuration, if one exists, must be established to allow free communication between all of these components. The configuration should take into consideration whether or not client machines will be accessing the *AcquiLine-Customer Request* web server outside of the firewall.

1.2.2 Email Server Information

AcquiLine-Customer Request supports email alerts to notify users of specific system events. The application currently supports the Simple Mail Transfer Protocol (SMTP). To enable alerts, the application needs the following components: a SMTP Mail Server and a valid email account on the SMTP Mail Server. The unavailability of either the SMTP host or mail account will not affect any other portion of the *AcquiLine-Customer Request* system. Currently, email alert functionality is only available to sites with one *AcquiLine-Customer Request* web server set up for each PD² database.

1.3 FORSCOM Sites to Use AcquiLine

Multiple FORSCOM sites have implemented *AcquiLine-Customer Request*.

Table 2: FORSCOM Sites, below, lists all the FORSCOM sites to implement *AcquiLine – Customer Request* and associated point of contact information.

Table 2: FORSCOM Site Information

Installation	UIC	POC	Phone	email
Ft. Bragg, NC	DAKF40	Sue Griggs	910-396-4362 X220	griggss@bragg.army.mil
Fort Campbell, KY	DAKF23	Patty Shaffer	(502) 798-7805	shafferp@emh2.campbell.army.mil
Ft. Stewart, GA	DAKF10	Brenda Austin	(912) 767-2959	austinb@emh5.stewart.army.mil
Fort Drum, NY	DAKF36	Kelly Price	(315) 772-5441	pricek@drum-emh4.army.mil
Army Atlanta CC	DAKF11	Phyllis Rogers	(404)464-2753	rogersph@forscom.army.mil
OPARC	DAKFXX	Maj Scott Campbell	404-464-7463	marr@forscom.army.mil
Fort Hood, TX	DAKF48	Judy Wardlow	(254) 288-5301	wardlowj@hood.army.mil
Fort Carson, CO	DAKF06	Mary Henry	(719) 526-6594	henrym@carson-exch1.army.mil
Fort Riley, KS	DAKF19	Richard Depew	785-239-2505	depewr@riley-emh1.army.mil
Fort Lewis, WA	DAKF57	Justina Williams	253-967-2151 x249	williamj@lewis.army.mil
Fort Polk, LA	DAKF24	Donna Stallard	(318) 531-2351	stallard@polk-emh2.army.mil
Fort Irwin & NTC, CA	DAKF04	Larry Peterson	(760) 380-4472	petersol@irwin.army.mil
Fort Dix, NJ	DAKF29	Trudy Fredrick	(609) 562-2487	fredrickt@dix-emh6.army.mil
Fort McCoy, WI	DAKF61	Sandra Baker	608-388-2800	bakers@emh2.mccoy.army.mil

1.4 FORSCOM-level "To-Be" process

It was decided at the FORSCOM Orientation that there would only be one FORSCOM-level “To-Be” process. The only stipulation that the FORSCOM is imposing on all sites is to complete all required fields in a PR, as required by PD² and AR 710-2, prior to routing the PR to PD².

Table 3: PR (Purchase Request) Checklist, lists all the fields that are required by PD² and located in *AcquiLine – Customer Request*.

Table 3: PR (Purchase Request) Checklist

Required Fields	Tab	Explanation
Description	Main Form	A description of the PR must be entered. This is a limited, but free form field.
Purchase Request Number	Main Form	Each PR must have a 14-character number prior to being sent to PD ² .
Issuing Office	Main Form	An approved Issuing Office must be displayed for each PR. That Issuing Office must have a unique local code. The Issuing Address is selected by the AcquiLine system administrator (ICW the PD ² system administrator) and automatically fills in on the PR
Line Item	Line Item	Each PR must have at least one Line Item.
Description	Line Item	A description of the Line item must be entered. This is a limited, but free form field.
Delivery Date/ADC or Period of Performance	Line Item, Detail	Either the Delivery Date or the Start/End Date for a Period of Performance must be entered.
Quantity	Line Item, Detail	Quantity must be greater than or equal to zero.
Estimated Unit Cost	Line Item, Detail	Unit cost must be greater than or equal to zero.
Funding	Line Item, Funding	If funding at the Line Item level, <u>each</u> CLIN must have a funding strip of 65 characters. Each Line Item can only have one funding strip. Lines of accounting must be approved.
Shipping Address	Line Item, Shipping	A shipping address must be selected. That shipping address must have a unique local code.

2. Training

2.1 Overview of AcquiLine Training

Hands-on training was limited to the Core Team during the Training/Implementation at Fort Hood. It is the responsibility of the Core Team to determine and plan training for other/future site users. To familiarize functional users, familiarization workshops were provided for those users at Fort Hood on 7 and 13 April 2000.

2.2 Training for the Core Team

2.2.1 Purpose

The Core Team was provided with training to enable its members to use *AcquiLine-Customer Request*, to provide insightful comments for the “to be” business process reengineering (BPR) process, and to develop a plan for training other/future users. The system administrator and Core Team members were also trained on the system administration duties for *AcquiLine-Customer Request*.

2.2.2 Content

The Core Team received one day of hands-on training during the Training/ Implementation. The Lessons are contained in the *AcquiLine-Customer Request* Student Guide and consist of:

- Lesson One – Start Up and Basics (registration and log in)
- Lesson Two – System Administration
- Lesson Three - Requirements (processing a PR package and submitting into PD²)

The emphasis was on the Core Team working in all aspects of *AcquiLine - Customer Request*. This included performing user registration and system administration actions, as well as creating, routing, and approving a Purchase Request. Performing these actions enabled the Core Team to further participate in Training/Implementation activities and to support the site’s other *AcquiLine - Customer Request* users.

2.2.3 Documentation

The *AcquiLine - Customer Request* Student Guide is currently available for downloading from the Army, DCSLOG, website at <http://www.hqda.army.mil/logweb/directorates/sm/smhp.htm>. In addition to the Student Guide, the site may use the DCSLOG website for electronic copies of the Functional User Guide, Systems Administrator’s User Guide, and the “Creating A Purchase Request” quad-fold, quick reference guide.

2.2.4 Core Team Members Trained

All Core Team members identified in Table 4 below received and participated in the training.

Table 4: Core Team Training Participants

Member	Title	Org	Phone (DSN)	E-mail (all are @hood.army.mil)
Wade Utley	Admin Asst	DCA	2879265	Wade.Utley
John Sammis	Info Mgmt Specialist	1114th Signal Battalion, DOIM	287-8274	John.Sammis
Randy Kirschner	Budget Analyst	4ID	287-7157	Randy.Kirschner
Zach Thompson	Facilities Engineer	4ID	288-5257	Zachary.Thompson
Brockley.Moore	13th COSCOM, G4	COSCOM, G4	287-8869	Brockley.Moore
Pamela Thomas	Supply Clerk	DOL, IPBO	288-6076	Pam.Thomas
Frank Dowling	Supply Tech	DOL, IPBO	287-3762	Frank.Dowling
Clyde Reynolds	Supv, Gen Engr	DPW	287-9813	Clyde.Reynolds
Joe Holston	IAPO Mgt Spec	ACSRM	287-3799	Joe.Holston
Sandy Childs	Security Specialist	III Corps, G2	287-4706	Sandra.Childs
Suzy Henderson	Supply Tech	DPW	288-6285	Susan.Henderson
Richard Long	III Corps, G4, SGM	III Corps, G4	288-3188	Richard.Long
Guy Hunter	4th Inf GSO	4ID	287-0262	Guy.Hunter
Linda Dickey	Budget Analyst	ACSRM	287-0237	Linda.Dickey
Ruth McIlvenna	Budget Analyst	ACSRM	287-7339	Ruth.McIlvenna
Mary McCauley	Comptroller	13th COSCOM	287-8891	Mary.McCauley
John Cox	IPBO	DOL, IPBO	287-6722	John.Cox
Jay Glazener	Sup, Eng Tech	DPW	286-6115	Jay.Glazener
Nolia Lanza	Lead Supply Tech	4th CMMC, 13th COSCOM	287-0884	Nolia.Lanza
Rick Tarasiewicz	ID, III Corps, G6	III Corps, G6	287-9556	Rick.Tarasiewicz
Doris Williams	Training Tech	Education Svcs Div	287-2819	Doris.Williams

2.3 Familiarization Sessions for Other Users

Two familiarization sessions were held for designated users other than the Core Team members. Of the two options available, a hands-on session for a maximum of 15 users or a demonstration for a larger audience, the Core Team selected two demonstrations given by the Implementation Team. All sessions emphasized the users seeing all functional aspects of *AcquiLine-Customer Request*. Attendees received a copy of the *Creating a Purchase Request* brochure.

Session	Date	Type	Topics	Attendees	Time
I	7 Apr 00	Demo	Student Guide Lesson 3	89	2.5 hours
II	13 Apr 00	Demo	Student Guide Lesson 3	76	hours

A familiarization session was also conducted for 25 members of the CCMD. The session concentrated on those aspects of AcquiLine and PD² that would most directly affect the contracting personnel.

Additionally, familiarization and hands-on sessions were provided during days 7 and 8 to Core Team-identified users.

2.4 Resources for Training

There are several options for training on *AcquiLine – Customer Request* available. Training may be self-training where the user consults any number of resources available, or may be a formal hands-on training session for a group of users. To aid in training, AMS has made available the *AcquiLine – Customer Request* Student Guide, Functional User Guide, System Administrator's User Guide, and the "Creating a Purchase Request" quad-fold, quick reference guide.

2.5 Training for Other/Future Users

The plan for training other/future users was developed by the Core Team and provides the details for that training.

2.5.1 *Considerations for Training*

The Core Team considered the following:

- Number of users and organizations to be trained.
- Relative computer/Internet expertise of users.
- Relative ease of using AcquiLine in support of the Contracting organization.
- Number of users attending familiarization sessions.
- Training resources available.
- AcquiLine implementation date.

2.5.2 *Options for Training*

The Core Team identified the following options:

- Core Team members provide training and/or coaching.

- Users conduct self-training.
- Site receives formal training/familiarization during Sustainment Support.
- Some combination of the above.

2.6 Training plan

It was decided that the organizations will determine their own training plans. The training dates for each organization have not been set, but organizations should consider allowing users to access/use AcquiLine upon each user's completion of training. Other details of the training/familiarization are to-be-determined.

It is the opinion of the Core Team that, while the software is not exceedingly difficult to use, all users must practice. The Core Team determined that as many users as possible should attend one of the familiarization sessions prior to using AcquiLine.

Training documentation (student guide and a brochure) is available for download from the DA, DCSLOG, web site at: <http://www.hqda.army.mil/logweb/directorates/sm/smhp.htm>. See paragraph 2.2.3 above.

Additionally, each organization will identify any internal Power Users who can assist others with the AcquiLine process.

Organizations allowing users to practice prior to actual PR processing should consider entering (DO NOT BUY), or some other wording, to indicate that the PR is a practice PR. This will prevent confusion if a practice PR inadvertently gets routed to PD².

Sustainment Support personnel should be prepared to conduct training or familiarization

3. Site Standing Operating Procedures

3.1 Purpose of the Site-Level Training/Implementation

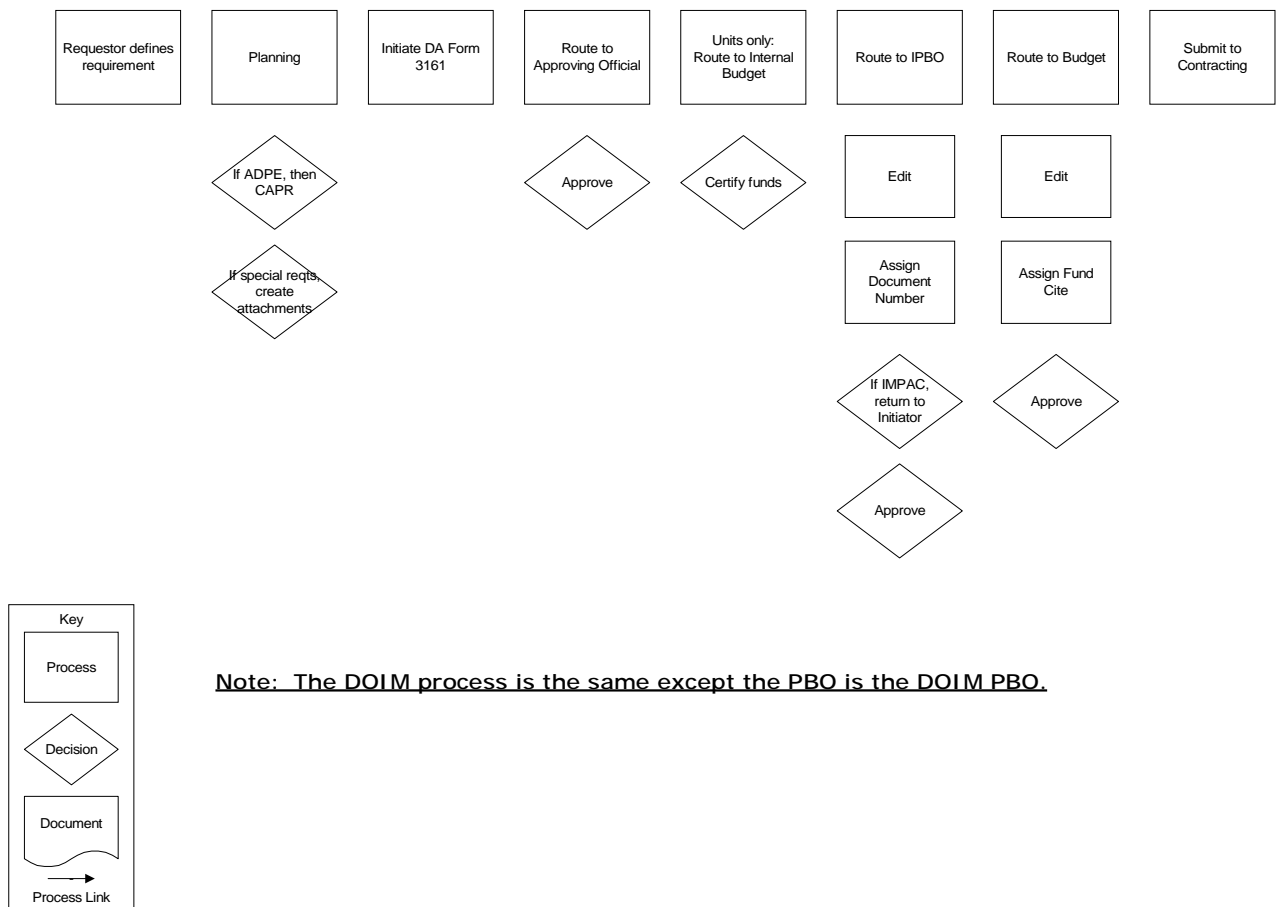
The purpose was to review existing business practices for requirements submittals, learn the functionality and administration of *AcquiLine-Customer Request*, and develop revised business practices to utilize *AcquiLine- Customer Request*.

3.2 Site "As Is" Process

The Core Team validated the "As Is" processes as displayed below.

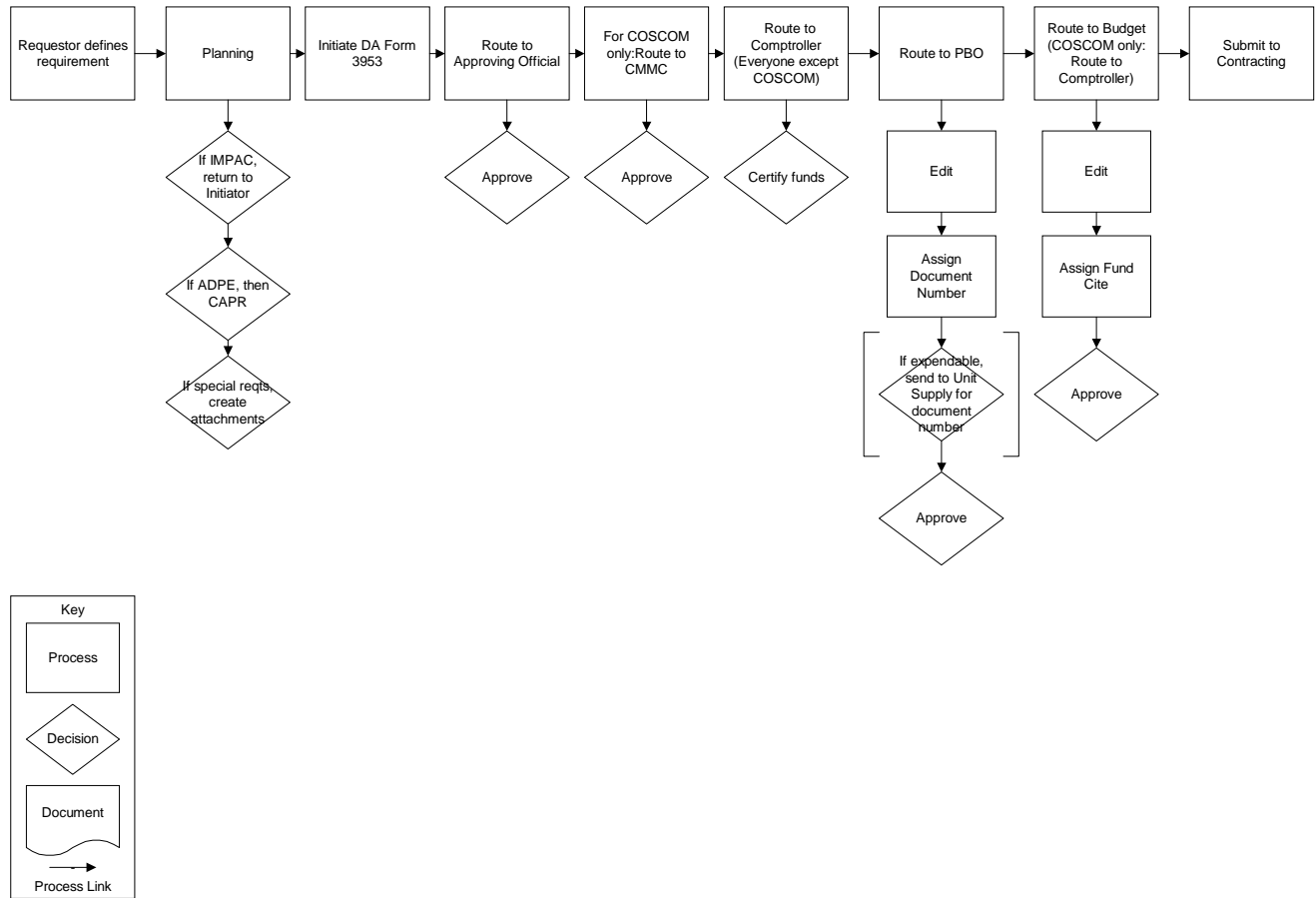
3.2.1 "As Is" BPR Process – Installation Supply

"As-Is" BPR Process for Fort Hood - Installation Supply



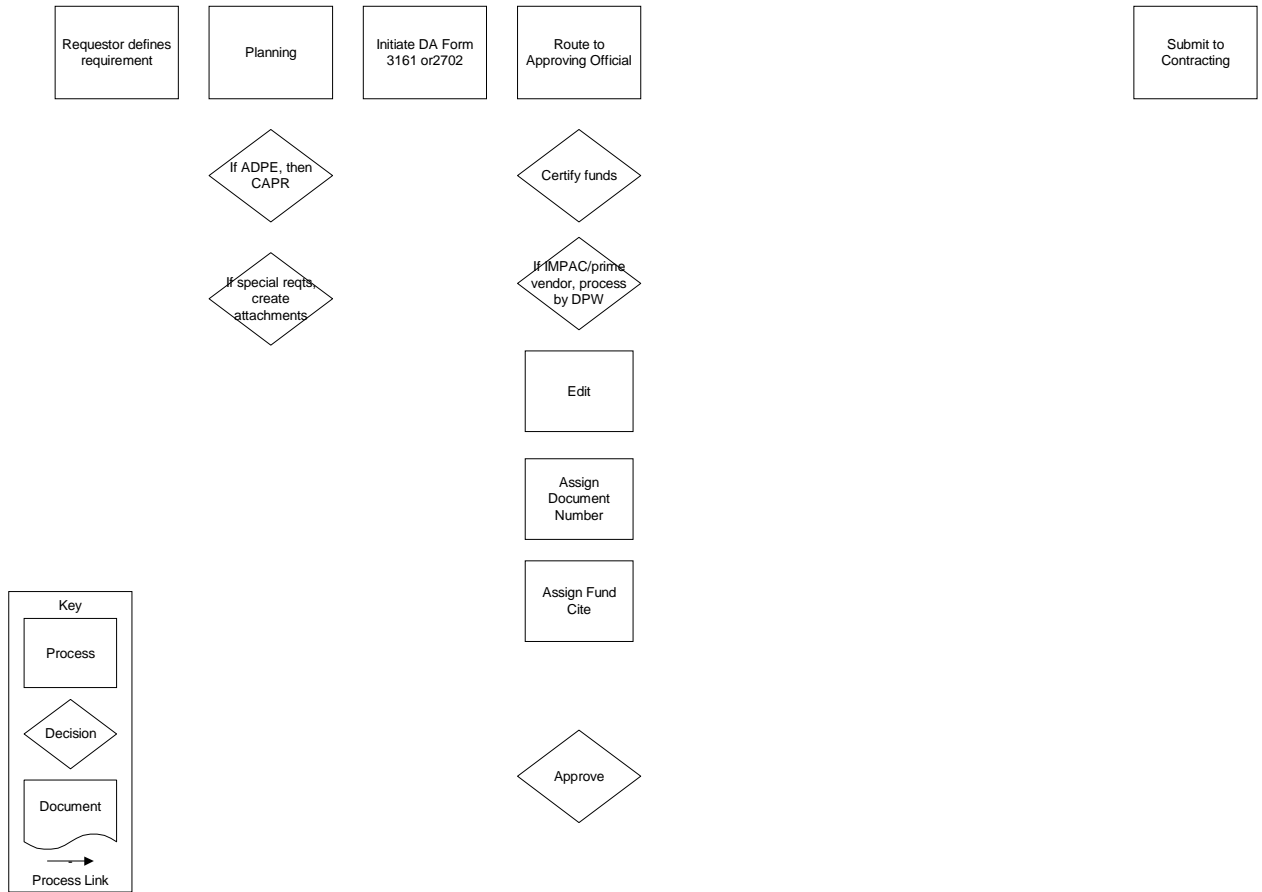
3.2.2 “As Is” BPR Process – Division and Non-Divisional Supply

“As-Is” BPR Process for Fort Hood - Division and Non-Divisional Units Supply



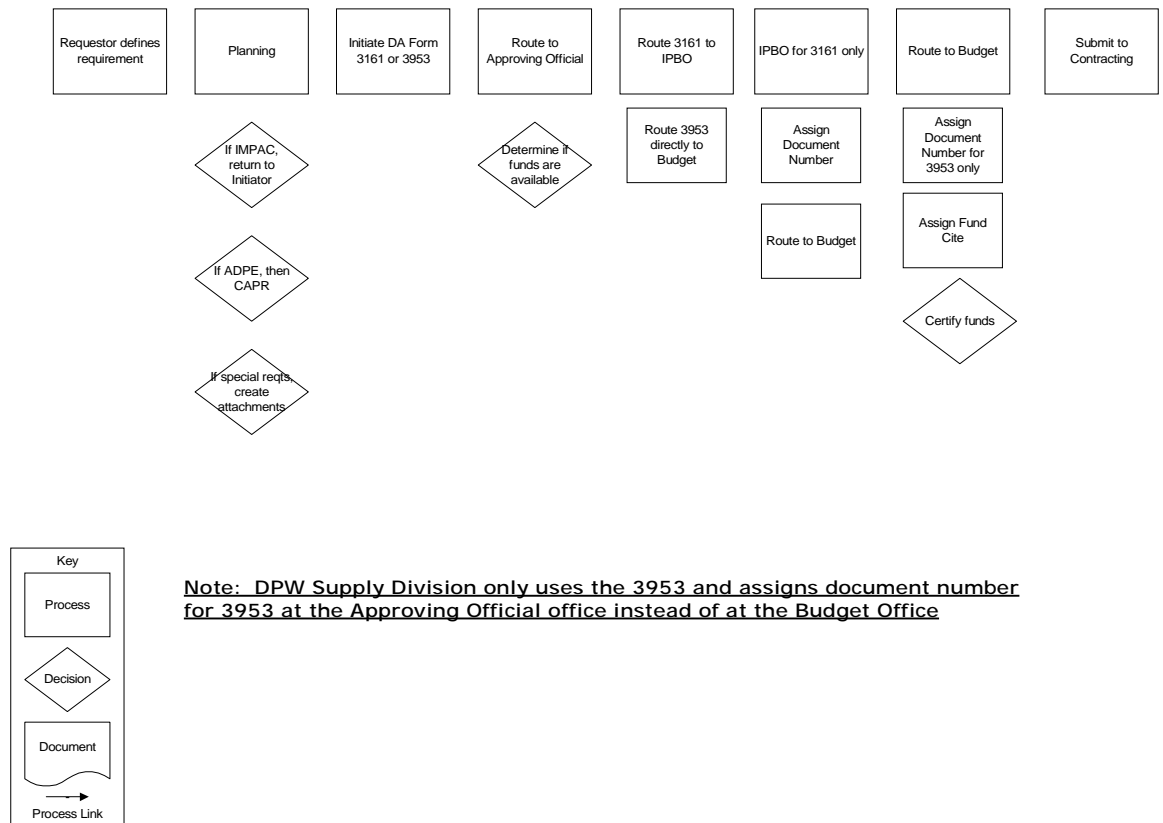
3.2.3 “As Is” BPR Process – DPW Supply

“As-Is” BPR Process for Fort Hood - DPW Supply



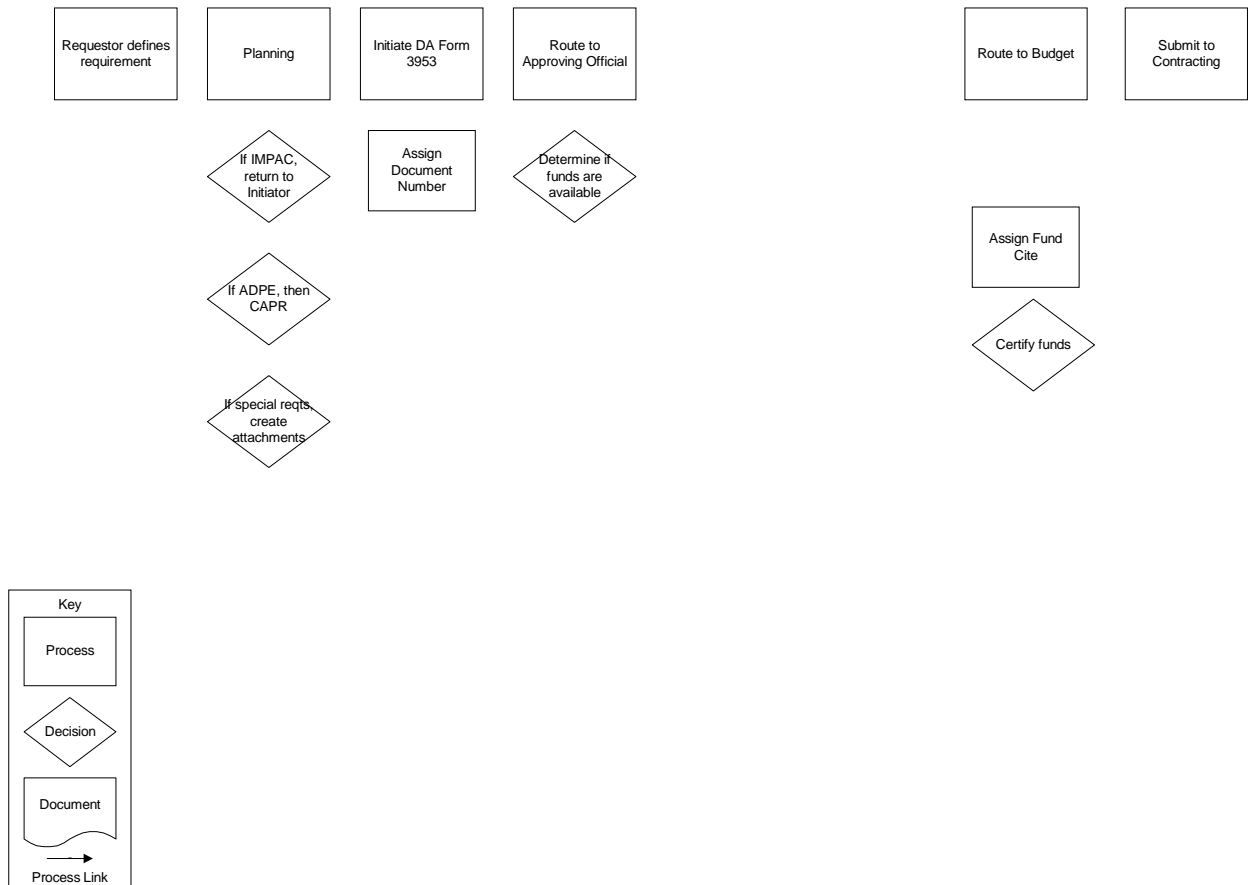
3.2.4 “As Is” BPR Process – Installation Services

“As-Is” BPR Process for Fort Hood - Installation Services



3.2.5 “As Is” BPR Process – Division and Non-Divisional Services

“As-Is” BPR Process for Fort Hood - Division and non-Divisional Units Services

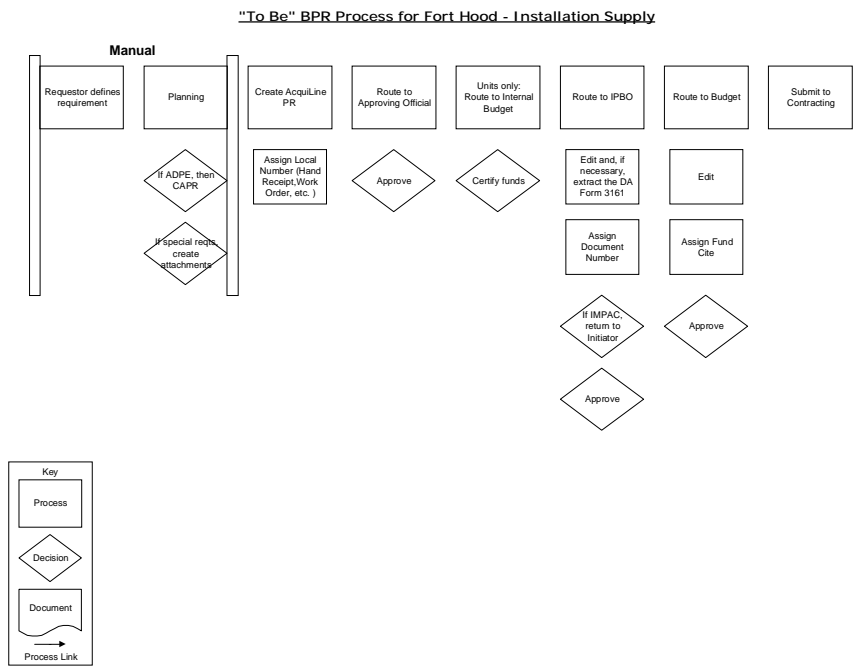


3.3 Site "To Be" Process

The Core Team validated the “To Be” processes as displayed below. Additionally, MAJ Mark Robinson, 1st Cavalry Division Comptroller, participated in the To Be validation.

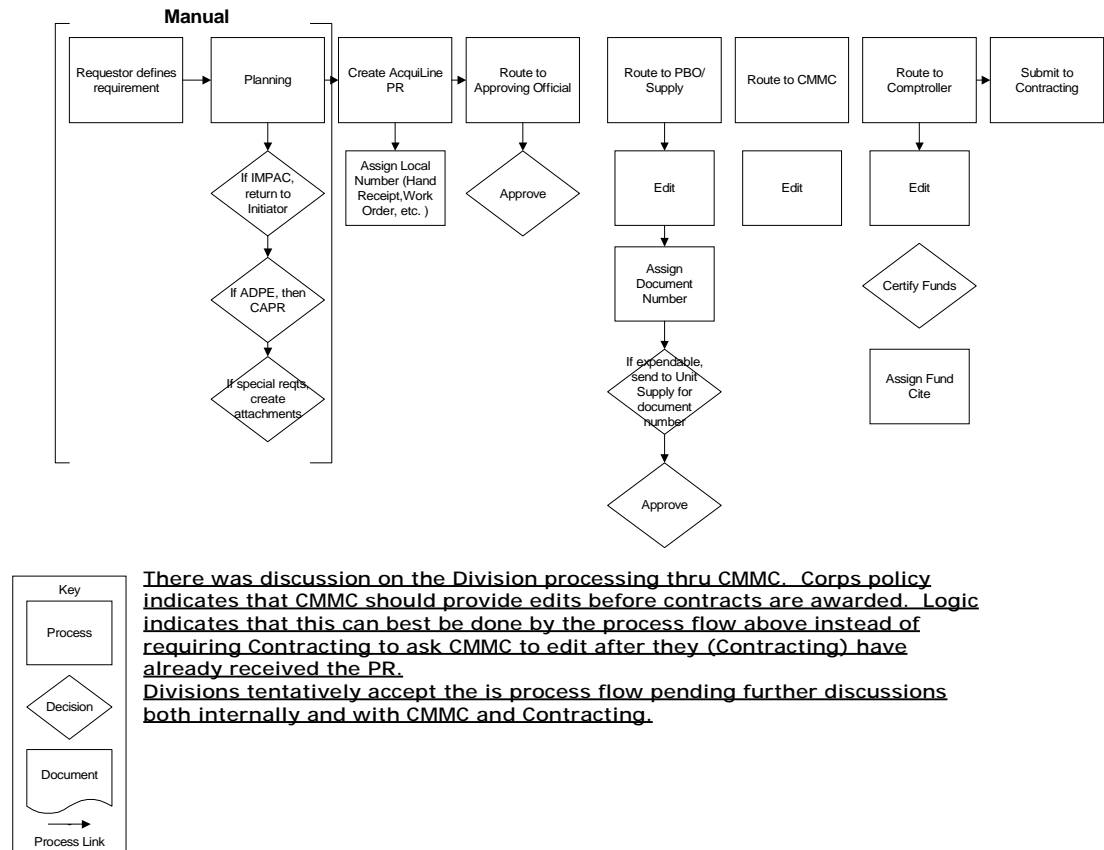
“

3.3.1 “To Be” BPR Process – Installation Supply

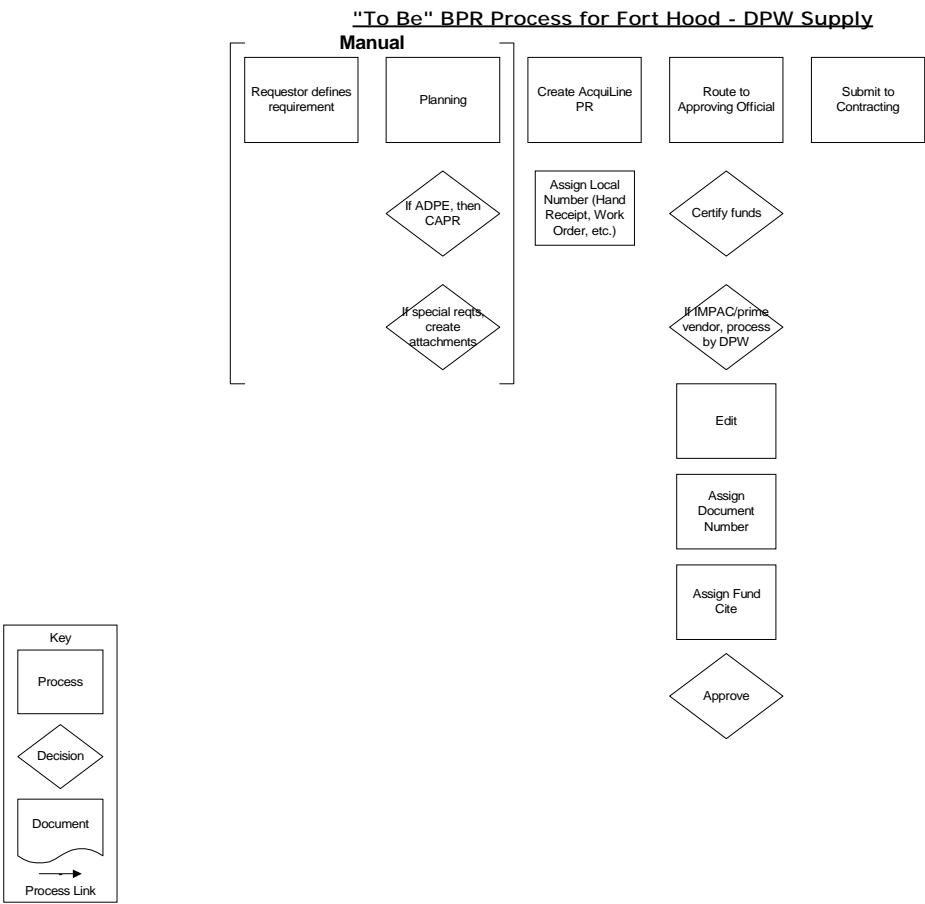


3.3.2 “To Be” BPR Process – Division and Non-Divisional Units Supply

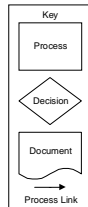
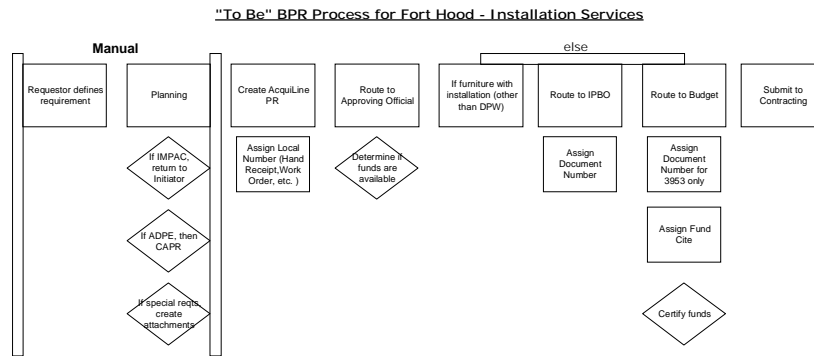
“To Be” BPR Process for Fort Hood - Division and Non-Divisional Units Supply



3.3.3 “To Be” BPR Process – DPW Supply



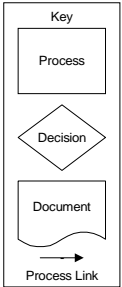
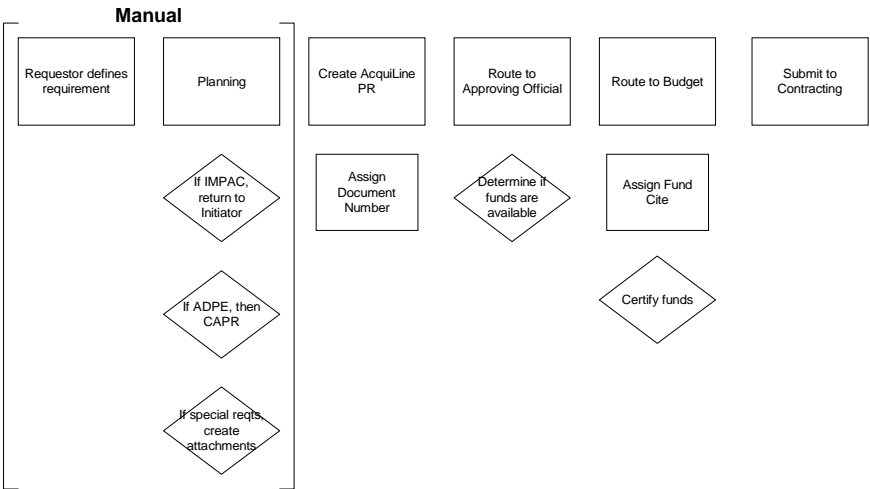
3.3.4 “To Be” BPR Process – Installation Services



Note:
AcquiLine PR will be used for System 21/Dining Facility installation and assembly (furniture or equipment).
DPW Supply Division assigns document number at the Approving Official office instead of at the Budget Office.

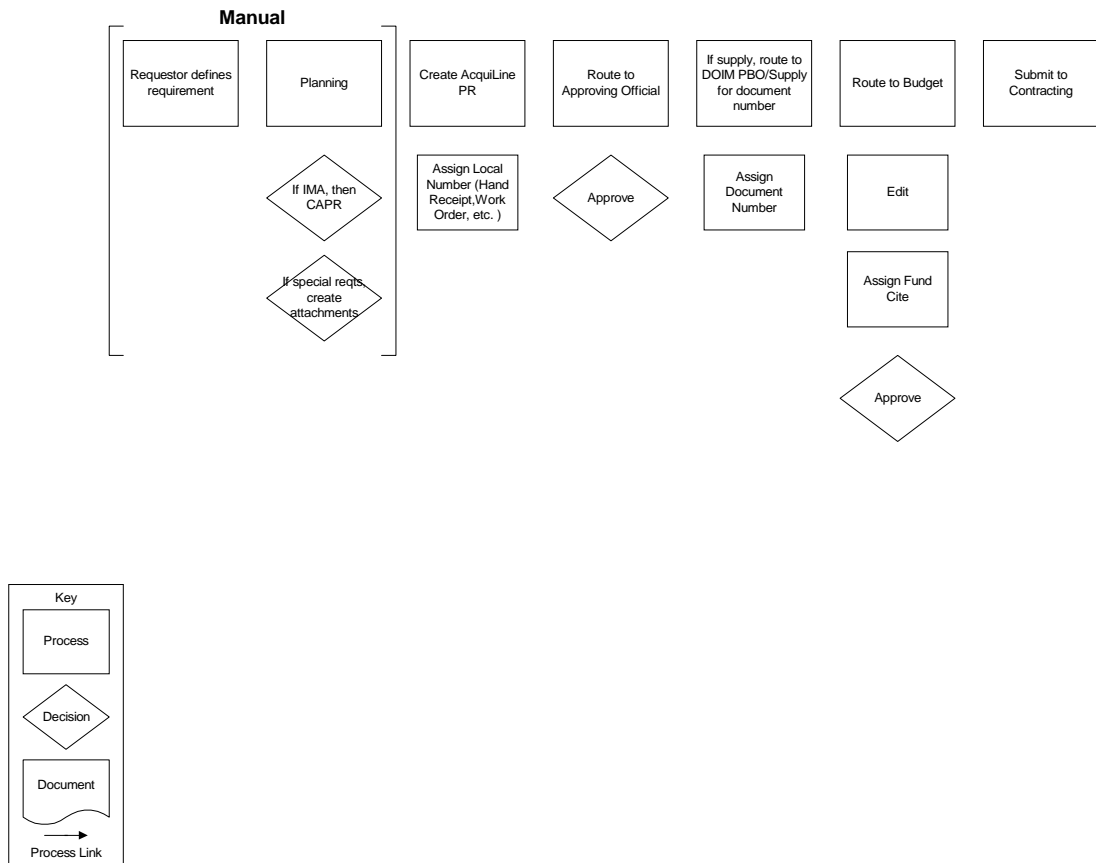
3.3.5 “To Be” BPR Process – Division and Non-Divisional Units Services

"To Be" BPR Process for Fort Hood - Division and Non-Divisional Units Services



3.3.6 “To Be” BPR Process – DOIM Supply (Tier III only) and Services

“To Be” BPR Process for Fort Hood - DOIM Supply (Tier III only) and Services



3.4 "To Be" Process described and defined

A discussion of the “To Be” processes are described below:

- The “To Be” processes are closely aligned with the “As Is” processes, that is, other than the manual determination of need, the process flows closely follow what is being done now.
- There are a number of processes for tenants/other units that are still to be determined
- Organizations will continue to define and refine their SOP to reflect lessons learned and/or the capturing of best practices for the site.
- Concerns/adjustments to the processes are indicated in the Notes contained in the To Be paragraphs above.

3.5 Reports

The following report was requested. The request will be submitted to the *AcquiLine – Customer Request* Requirements Department for review. If approved and developed, the requested report will appear in future updates as one of the standard reports.

Table 6: Requested Reports

Report	Description
1	One which allows any AcquiLine user to search for and determine status of any AcquiLine PR. This allows an organization to monitor status of all PRs without regard to Initiator capabilities or absences.

3.6 Help Desk Strategy

AMS provides technical and functional phone support to Army *AcquiLine – Customer Request* “authorized callers” as part of the annual maintenance. Each server site is entitled to designate two “authorized” plus one additional supplemental caller to call the AMS AcquiLine Telephone Help Desk for *AcquiLine – Customer Request* support. The AcquiLine Help Desk will continue to be the primary point of contact for “authorized callers” 24 hours a day, seven days a week. AMS will be on site at the AMS office in Fairfax to answer calls Monday through Friday from 7:00am – 7:00pm EST. During off-hours, an AMS help desk resource will be available via pager to address critical caller issues.

Authorized callers for Fort Hood AcquiLine users are:

<u>Name</u>	<u>Organization</u>	<u>Telephone</u>
Ms. Judy Wardlow	Contracting Command	288-5301
Ms. Maria Martinez	Contracting Command	287-3246
SSG Mary McCauley	13 th COSCOM	287-8891

Additional authority for authorized callers to represent 1CAV and 4ID have been requested, but have not yet been granted.

3.6.1 Help Desk Assistance

If, the *AcquiLine – Customer Request* user, Power User, and System Administrator/ Authorized Caller cannot resolve the issue, the System Administrator/Authorized Caller will escalate the issue to the PD² Help Desk located at AMS. Before calling Help Desk, the caller should take the following steps:

1. Make sure the issue is not a misunderstanding of the proper use of the systems described in the *AcquiLine – Customer Request* user manual. The caller should verify that the user followed the steps in the user manual for the procedure or task.
2. Both the Power User and System Administrator/Authorized Caller have reviewed the issue and have been unable to solve the problem.
3. The issue is repeatable with some level of consistency. The caller should try to recreate the problem.
4. Determine the level of importance for the issue.

The AMS PD² Help Desk Analyst will log the call into the help desk database, give the caller an issue tracking number, and assist the caller with the problem. If the analyst is unable to assist the caller, the analyst will assign the issue to a Help Desk specialist. The specialist will work with the caller to either find a solution to the issue or find an acceptable work-around. With the issue tracking number, the caller can contact the AMS PD² Help Desk at any time to check on the status of an issue.

3.6.2 Documentation Required for Help Desk Assistance:

1. Get a detailed description about the issue.
2. Ask pertinent questions; many issues can be immediately resolved with the correct information. When resolving an issue, too much information is far better than too little. Important questions to ask include:
 - What error messages did you receive?
 - In what window (screen) were you working?
 - What buttons did you push?
 - What data did you enter or select?
3. Once the System Administrator has gathered all the information about the issue, he or she should determine the correct issue severity before calling the AMS PD² Help Desk

3.6.3 The AcquiLine – Customer Request Help Desk can be accessed from the AMS PD² Help Desk.

The site's Authorized AMS PD² Help Desk Caller may access the *AcquiLine – Customer Request* Help Desk in the same manner and phone number as with AMS PD² Help Desk.

AMS provides the AMS Help Desk to assist authorized callers with any *AcquiLine - Customer Request* related issues that a site cannot resolve. The AMS PD² Help Desk Analyst will attempt to find an acceptable resolution to the issue, give the caller an issue identification number, and enter the issue into the PD² issue tracking database.

3.7 Available tools for self-sufficiency

3.7.1 *AcquiLine Menu Help Topics*

Users are able to obtain a web-based tutorial directly from the startup AcquiLine Menu. To do so, select **Help → Help Topics**. This will connect you to the tutorial with assistance on the following topics: **Introduction, Registration, Navigation, Purchase Request, Attachments, Reports and Summary**.

3.7.2 *AcquiLine Web Based Support:*

The AcquiLine web site at <http://AcquiLine.amsinc.com> supplies users with valuable information regarding the *AcquiLine – Customer Request* application. Online help information can be found under the Product Support heading, with the following topics represented:

Getting Started With AcquiLine:

This is a brief tutorial on the basics of using the *AcquiLine - Customer Request* application. The Help Menu within the AcquiLine application accesses its content, and its topics are the same as those listed above.

Registration:

Register here to use the AcquiLine Help Desk or the Knowledge Base. The Knowledge Base is a searchable source of online Frequently Asked Questions that can be used as a resource to resolve issues before calling the Help Desk. Specific users, as determined by AMS and site administrators, have the ability to download AcquiLine documents through this web site. Registered users may submit Incident Reports here as well.

Help Desk:

Use the AcquiLine Help Desk to document a technical problem with the AcquiLine software. *This feature also requires prior user registration.*

3.7.3 *Purchase Request Quad-Fold*

AMS has created and distributed a “Creating a Purchase Request” quad-fold, quick reference guide. These guides are designed to be a quick reference tool that covers most of AcquiLine’s functionality. The guide may be downloaded from the DCSLOG web site, <http://www.hqda.army.mil/logweb/directorates/sm/smhp.htm>.

4. Configuration

4.1 Connecting to AcquiLine – Customer Request

4.1.1 *AcquiLine - Customer Request Users*

- All *AcquiLine - Customer Request* users must have a computer with a web browser that supports Java 1.1.4 (Microsoft Internet Explorer 4.0.1 or higher). Install a web browser, if one is not already installed on the computer.
- Connect to the *AcquiLine - Customer Request* home page on the site's web server: <http://<IP Address DNS Name>/AcquiLine/home.html>, where <150.114.103.230> is the IP address or the DNS name of the web server.
- Set up a bookmark entry for the web browser for easy access.

4.1.2 *PD² Users*

PD² users who should have access to *AcquiLine - Customer Request* routed PR documents will need to upgrade the PD² software on their computer.

- Replace the **AcquiLine.pbd** on the client machine's PD² directory with the **AcquiLine.pbd** file from the *AcquiLine - Customer Request* website.

4.2 Users Participating in the Configuration Session

The following Core Team members participated:

Table 7: Core Team Configuration Session Participants

Member	Title	Org	Phone (DSN)	E-mail (all are @hood.army.mil)
Wade Utley	Admin Asst	DCA	2879265	Wade.Utley
John Sammis	Info Mgmt Specialist	1114th Signal Battalion, DOIM	287-8274	John.Sammis
Randy Kirschner	Budget Analyst	4ID	287-7157	Randy.Kirschner
David Martin	4ID IPBO	4ID	288-3293	
Zach Thompson	Facilities Engineer	4ID	288-5257	Zachary.Thompson
Brockley.Moore	13th COSCOM, G4	COSCOM, G4	287-8869	Brockley.Moore
Pamela Thomas	Supply Clerk	DOL, IPBO	288-6076	Pam.Thomas
Frank Dowling	Supply Tech	DOL, IPBO	287-3762	Frank.Dowling
Clyde Reynolds	Supv, Gen Engr	DPW	287-9813	Clyde.Reynolds
Joe Holston	IAPO Mgt Spec	ACSRM	287-3799	Joe.Holston
Suzy Henderson	Supply Tech	DPW	288-6285	Susan.Henderson

Richard Long	III Corps, G4, SGM	III Corps, G4	288-3188	Richard.Long
Guy Hunter	4th Inf GSO	4ID	287-0262	Guy.Hunter
Linda Dickey	Budget Analyst	ACSRM	287-0237	Linda.Dickey
Ruth McIlvenna	Budget Analyst	ACSRM	287-7339	Ruth.McIlvenna
Mary McCauley	Comptroller	13th COSCOM	287-8891	Mary.McCauley
John Cox	IPBO	DOL, IPBO	287-6722	John.Cox
Jay Glazener	Sup, Eng Tech	DPW	286-6115	Jay.Glazener
Maria Martinez	Procurement Analyst	CCMD	287-3246	Maria.Martinez
Judy Wardlow	System Administrator	CCMD	288-5201	Judy.Wardlow
Nolia Lanza	Lead Supply Tech	4th CMMC, 13th COSCOM	287-0884	Nolia.Lanza
Rick Tarasiewicz	ID, III Corps, G6	III Corps, G6	287-9556	Rick.Tarasiewicz
Doris Williams	Training Tech	Education Svcs Div	287-2819	Doris.Williams
John Whilden	GSO Chief	1 CD DMMC	287-4725	John.Whilden
Leeann Burke	Contracting Spec	CCMD	287-5457	Leeann.Burke
Leonard Mettlach	Supply Tech	CCMD	287-5456	Leonard.Mettlach

4.3 AcquiLine New User Standards

4.3.1 Establishing New User Accounts

Users shall register and be approved by the AcquiLine SA (system administrator). Note that by the end of the Training /Implementation, the Core Team members had registered, and that other users performing the actual PR processing had either registered or had user accounts created for them.

The AcquiLine SA shall not approve a registrant unless the SA has a message from the AcquiLine POC in the registrant's organization assuring that the registrant is an authorized AcquiLine user. Organizations will provide a list of their AcquiLine POC(s) who can assure a registrant/user is authorized as an AcquiLine user to the AcquiLine SA.

4.3.1.1 Registration Policies

4.3.1.1.1 New User Names

The AcquiLine User Name shall be the userid portion of the user's e-mail login. The new naming convention (First name.Last name) shall be used. For example: John.Smith.

4.3.1.1.2 New User Passwords

The initial password will be selected by the AcquiLine user during registration. It is suggested that the initial password be the same as the current lan/e-mail password. After initial login, the user may change his/her password at any time. The user shall change his/her password when required to change his/her lan/e-mail password.

4.3.1.1.3 Contact Name

Users shall enter military rank, as applicable. It is also suggested that the organization be included in parentheses after the name. For example, SSG John D. Smith (4ID PBO).

4.3.1.1.4 Telephone Numbers

The telephone/fax numbers shall be entered with area code, prefix and suffix (Not DSN), for example, 254-287-2345.

4.3.2 *New User Accounts Timeline*

Users may register as each organization desires, but will not be approved until the organization's AcquiLine POC assures the AcquiLine SA that the registrant is an authorized AcquiLine user.

4.4 Expiring User Accounts

The organization's AcquiLine POC shall notify the AcquiLine SA as soon as feasible when a user no longer requires access to AcquiLine. Reasons may include PCS, security, job changes, etc.

The AcquiLine SA shall disable the user's login upon notification or upon the date requested.

Organizations should consider transfer of AcquiLine information for planned departures or absences. For example, another user can initiate new PRs and listings of PRs in the Outbox and Archives folders can be provided.

Other measures can be taken by the AcquiLine SA to assist, but should only be considered in an emergency.

4.5 AcquiLine and PD² Database Configuration

Organizations must be in the PD² database prior to selection/use by the AcquiLine registrant/user. The PD² SA has ensured that initial Requesting Organizations, Ship To organizations, and the Issuing Office have been entered into PD². Once any users, Groups, and Routing Templates have been entered into AcquiLine, an additional requirement may exist for entering suggested vendors/manufacturers into PD².

If an AcquiLine user cannot find a suggested vendor/manufacture, the user may request that the contracting office add a vendor. This can be accomplished by the AcquiLine user entering sufficient identifying vendor information into the Comments portion of the Main Form of the PR

Additionally, Ship To organizations shall include specific identifying information (building number, bay number, etc). The PD² SA must approve new organizations.

All future organizational addresses will be entered into PD² with the name spelled out and in upper case. Examples are: ACOFS, RESOURCE MANAGEMENT; DIRECTORATE OF LOGISTICS; DIRECTORATE OF INFORMATION MANAGEMENT; DIRECTORATE OF PUBLIC WORKS; 4TH INFANTRY DIVISION.

4.6 PR Numbering Convention

4.6.1 Background

Fort Hood users may interchangeably use Document Number, Requisition Number, PR Number, or Document Reference Number to refer to the same item.

- AcquiLine requires a **Purchase Request Number** be entered on the PR prior to its being saved.
 - A **Purchase Request Number** may not be duplicated in AcquiLine.
 - A **Purchase Request Number** will be formatted as follows:

<u>Position(s)</u>	<u>Data</u>
1-6	DODAAC
7	Fiscal Year
8-10	Julian Date
11-14	Sequence Number for that Julian Date

NOTE: A dash (-) must be entered between positions 6 and 7 and between positions 10 and 11.

EXAMPLE: W45CMJ-0001-0001

- A PBO can issue a **Document (Property Book) Number** for supply accountability (regardless of non-expendable or expendable). It consists of a 6-character identifier (the DODAAC), 4-digit Julian date, and 4-character serial/control number.
- A **Standard Document Number** (14 characters) is required as part of the 65-character Accounting Classification/fund cite completed/assigned by the Budget Office/Comptroller. It usually is the PBO Document Number for supply items.

4.6.2 Purchase Request Number Tracking and Renumbering

Each TO BE process determined a numbering process in which Requisition Numbers, fund cite Standard Document Numbers, PBO Document Numbers, and AcquiLine PR Numbers are to be entered and, if necessary, modified.

Initiators must provide:

- AcquiLine PR Number decided by each activity.

- In the Description field, after Initiator completes a brief description, he/she will place the PR Number (the one used in Purchase Request Number field to the right) in parentheses behind the description.
- If a CAPR is required, the CAPR number will be included in the description.

The PBO shall enter the PBO Document Number and re-number the AcquiLine PR.

Budget/Comptroller/DRM shall enter the fund cite and be the last approver prior to entering PD².

Each organization shall determine a process such that the PR Initiator can enter a Purchase Request Number on the AcquiLine PR and be assured of his/her capability to track that number regardless of renumbering by the Budget Office/Comptroller when adding the fund cite. That process shall be taught to PR Initiators. Initially, PR Initiators can also place the original Purchase Request Number into both the Purchase Request Number field and the Comments field on the Main Form of the AcquiLine PR. For example, If the PR Initiator enters WL3GCD-0011-0011 as the Purchase Request Number, then he/she should place a comment in the Comments field that states: WL3GCD-0011-0011 is the original PR Number.

4.6.3 Multiple Line Items on a PR:

Although AcquiLine allows multiple CLINs per PR, the policy for Fort Hood will be as follows:

- ◆ Purchase requests will be entered with a single line item. This is necessary to facilitate the entire acquisition process (customer request, contracting, receiving, issuing, contract payment and closeout).

Although the Standard Procurement System (SPS) is designed to process multiple line items on a single purchase request the “one PR/one line item” rule will be followed at Fort Hood to facilitate the receiving, issuing, and property book systems.

- ◆ Purchase requests which are part of a grouping (e.g., furniture components, ADP components, etc.) will be submitted individually. A statement will be included in the comment block of the primary/first PR listing the range of purchase request numbers that are to be worked by the CCMD as a formal group.

4.6.4 Funding-level

Only Line Item (CLIN) -level funding shall be applied to a PR. Contract-level funding shall not be used.

4.6.5 Modifications

Users will submit request for modification to an existing award as an AcquiLine requisition. Users may use their original purchase request number with a suffix if desired. For example, if the user is requesting modification 1 to an award and the original purchase request on that award was W45CMJ-0001-0001 then the user may wish to use purchase request number W45CMJ-0001-0001 01 – the original purchase request number with a suffix of “01”.

Use of FHT 715-X7 is no longer required.

4.6.6 SAF Requirements

Users will include the following statement in the comment block on all requisitions that are submitted subject to the availability of funds:

“This requirement is included or provided for in the financial plan for FY __. The accounting classification will be _____. This statement is not a commitment of funds.”

4.7 PD² Recipients

The following recipients are identified as those contracting personnel who are in the AcquiLine Group in PD² and who should receive the PR via an AcquiLine Routing Sheet.

Note: The user may see numerous persons in the PD² select list on the AcquiLine Routing Sheet, but only one of the four listed below should be selected. If any PD² user other than the four listed below receive the PR package, the PR package should be routed to the PD² recipient and NOT returned to AcquiLine.

Who	Type
Nancy Brown	All new PRs or any PR in which the CCMD POC cannot be identified.
MAJ Brad Westergren	PRs intended as Delivery Order(s) to an existing Contract issued by CCMD (DAKF48) and in which MAJ Westergren is the applicable CCMD KO.
Patsy Baker	PRs intended as Delivery Order(s) to an existing Contract issued by CCMD (DAKF48) and in which Patsy is the applicable CCMD KO.
Maureen Huston	PRs intended as Delivery Order(s) to an existing Contract issued by CCMD (DAKF48) and in which Maureen is the applicable CCMD KO.
Barry Barnett	PRs intended as Delivery Order(s) to an existing Contract issued by CCMD (DAKF48) and in which Barry is the applicable CCMD KO.

Since return to AcquiLine from PD² is a very powerful tool, policy should be established in CCMD about when PRs are to be/can be returned. Initial policy will indicate that telephone and e-mail shall be used to the maximum extent possible to avoid returns.

4.8 Groups

The AcquiLine SA will create Groups based on organizational requests. The organization will establish a naming convention, and the AcquiLine SA will refine for AcquiLine use. Organizations can submit requests for Group names by e-mail. The Groups created by the AcquiLine SA can be seen by all users. Organizations may later decide to request additional Groups be created by the AcquiLine SA.

Since v4.1c has changed the concept for a Group in the routing process, it is suggested that organizations use Groups as a small set of users with equal signature authority. Routing by Groups in v4.1c implies that all members of a Group receive e-mail when a new PR arrives in the Group's Inbox.

4.9 Routing

Discussion: The AcquiLine, SA-created, Routing Templates can be viewed by all users. A user-created Routing Template can be viewed only by the user who created it. The number of users at a site influences the use of Routing Templates. Although Routing Templates serve as filters, the more users and the more SA-created Routing Templates may offset the flexibility of a user locating and selecting the appropriate users for his/her Routing Sheet. There should be a compromise between the number of Routing Templates available to all users and a process that quickly and easily allows a user to identify, locate, and select users for his/her Routing Sheet.

Note that, if an approver is out of the office, the Initiator will have ability to re-route a PR package. In an emergency, the AcquiLine SA can access a user's desktop (by changing password) and re-route as necessary.

4.9.1 Templates

Routing Templates provide filters so that each user does not have to scroll through all users when selecting users to route to.

The AcquiLine SA shall create the Routing Templates submitted by organizations. These Templates are visible to all users. Template names shall reflect organizational structure. Each organization shall decide the Template names, description, and users. Each organization will study the overall use of SA-created Templates versus user-created Templates. A suggested request for an AcquiLine Routing Template form was provided to the AcquiLine SA.

Users will create their own Routing Templates as applicable.

4.9.2 Routing

Although PR Initiators must select the PD² recipient, the number of other routing recipients varies by organizational requirements. Organizations shall determine routing style, that is, whether to

require PR Initiators to route to a limited number of AcquiLine approvers with some approvers then having the responsibility to complete the routing, or to select all AcquiLine approvers. In general,

- PR initiator will route PR to known approvers only, that is, to the next approver only or to multiple approvers, but only *to* those approvers he/she knows must be in the routing sheet.
- PR Initiators will, as a minimum, route to all AcquiLine approvers preceding and including the AcquiLine approver who will enter the fund cite.

The last AcquiLine approver in any organizational Routing Sheet shall be the AcquiLine approver who entered the fund cite. Budgeteer/funds certified/DRM is last approver before PR goes to PD².

If the routing continues to other organizations prior to submission into PD², then that user shall be responsible to ensure that the PR package is correctly routed to any other necessary AcquiLine approvers prior to submission into PD².

4.10 Windows 2000/Office 2000:

AcquiLine has been tested with Windows 2000. Sites should ensure FORSCOM DCSLOG has approved use.

AcquiLine has no problems with Office 2000; however, AcquiLine must submit OLE-compatible documents to PD². Although it appears that it is *okay* for now to use Office 2000 with PD², CCMD requests that organizations submit AcquiLine attachments as Office 97 versions.

4.11 FSC Codes for Supply PRs

Until v4.1c is used, the FSC Code shall be entered in the Comments field of the Main Form tab of the PR. If there is more than one FSC Code, the user shall enter the FSC Code that is scheduled to receive the majority of the funding for that PR.

4.12 Upgrade to AcquiLine v4.1.c

Although it is possible to upgrade AcquiLine independently, AcquiLine maintains synchronization with PD². Therefore, both PD² and AcquiLine were upgraded to v4.1.c on 20 April.

Note: A feature of AcquiLine 4.1c requires the SA to provide a list of Units of Issue and FSC Codes for use by all users, therefore, the SA should start now to determine such a list by coordinating with the Contracting office for the most common/frequently used Units of Issue and FSC Codes. Additionally, organizations are requested to send a list of their Units of Issue and FSC Codes to the AcquiLine SA as soon as possible.

4.13 Ship To Address and Unit Requirements

All AcquiLine users requesting supplies controlled by the Installation PBO shall use the following address as the Shipping/Ship To address:

DIRECTORATE OF LOGISTICS
INSTALLATION PROPERTY BOOK OFFICE
Building 89010, Bay 4
Fort Hood, TX 76544

This address appears in the PD2 database and can be selected in AcquiLine on the **Shipping** tab of each Line Item.

The Property Book Office shall check each routed-PR containing accountable items to ensure that the Ship To address is correct.

The Contracting Command will also check to ensure that the correct address is displayed in the PR prior to award.

Units shall not communicate a different address to the vendor.

4.14 PR Retention

It is recommended that users save a copy of their processed PR(s).

The Initiator may save a copy at any time since the PR remains on his/her desktop during all processing.

Other users may save a copy of any PR that can be seen on the user's desktop, that is, if they are a route recipient, the PR will appear in their desktop. The user must save the PR before approving.

To save the PR:

Highlight it

Select **Purchase Request→View Summary**

Select **Print HTML Report**

Select **File→Save As** and assign an appropriate filename/location.

4.15 Status

Acquiline users can obtain status of their purchase requests from the Standard Procurement System utilized by the Contracting Command. Status can be obtained for requisitions entered through Acquiline or requisitions previously submitted in paper form.

For detailed instructions on generating a wide variety of user reports and status inquiries follow the instructions given in **Section 11 Reports** of the Acquiline User Guide (page 53) which is attached as Annex 7.2.

5. Cut-Over

5.1 Cut-Over Strategy

The section describes the strategy for transitioning, or *cutting over*, from the current method of submitting requirements to the contracting office to using *AcquiLine – Customer Request*. This section will define the sequence of events necessary for Fort Hood to transition to the use of *AcquiLine – Customer Request* as smoothly as possible. Utilizing the cut-over strategy, as determined by the Core Team, will fully implement AcquiLine as the primary avenue for the development and approval of Purchase Requests for import into the PD².

5.2 Milestones

The Core Team considered three related aspects/milestones in determining cut-over strategy:

- **Kickoff** – An official kickoff date for each organization/group to allow management to review the implementation schedule.
- **Training** – When and how users are to be trained/familiarized with *AcquiLine – Customer Request*.
- **Actual Cut-over** – An official date for the installation to cease using their current PR processing and begin using *AcquiLine – Customer Request* as the preferred method of processing.

5.3 Agreed-to Cut-Over dates

It was determined that the site Kickoff date occurred on 3 April 2000.

It was decided that, while each organization shall determine its internal cut-over date, the site's cut-over date for all installation/division units, and non-divisional units shall be tentatively set as 1 July 2000. This final cut-over date implies that all organizations shall be using AcquiLine as their preferred PR package processing method (as close to 100% use as possible).

All organizations (Garrison, division units, non-divisional units) may begin practice and actual processing as they are ready. This will assist in keeping the training as fresh as possible.

Initially, AcquiLine users should notify CCMD that they have submitted PRs using AcquiLine.

It is recognized that some PR package processing may have to be manually performed because of contingencies, exigencies, or by direction.

CCMD will also monitor external influences for any changes to these dates.

Dates and events

3 April – AcquiLine Kickoff

20 April – Upgrades to v4.1c for PD² AND AcquiLine

14 April – 30 June – Timeline events from above

1 Oct – Final Cut-over to AcquiLine

5.4 Proposed Action Items in a semi-sequenced Timeline

Policy, Procedures, and Guidance (PPG)

- Initial information contained in Deliverable
- Organizations continue to develop with CCMD as lead

Training

- Organizations assess training requirements (number to be trained, resources available, planned dates for use, capabilities of users, formal vs self-sufficiency)
- Organizations determine training plan (facilities, trainers, users to be trained (including tentative power users), obtain/download/modify training materials/references)

User Support

- CCMD and organizations coordinate for ‘official’ organizational names/addresses (and vendor names/addresses) including address types
- CCMD ensures that PD² recipients of PRs from AcquiLine are in PD² AcquiLin Security Group (or Security Group as established in Site Management in AcquiLine)
- Organizations identify and submit frequently used Units of Issue and FSC Codes
- CCMD begins to identify frequently used Units of Issue and FSC Codes
- CCMD enters organizational names/addresses into PD²
- Organizations provide names of AcquiLine POCs to AcquiLine SA
- Organizations provide names of Groups to AcquiLine SA
- Organizations provide names of Routing Templates and users to AcquiLine SA
- Organizations determine schedule for users to register
- Users register
- AcquiLine POCs provide authorization messages for users

- SA approves users
- SA creates Groups and Routing Templates
- Organizations develop user-created Routing Templates
- Users create Routing Templates

ROBERT KENDRICK III
LTC, MP
Commanding

6. Appendices

6.1 Routing fundamentals and SOP

6.1.1 *Routing fundamentals*

Note: All references to a PR include a PR with any/all attachments.

Facts:

Routing is performed only to gain approval and place a PR into PD², that is, a PR cannot be routed just for review and return to creator.

Any user who has a PR on his/her AcquiLine desktop can view the approval history of the PR.

Any user who has a PR on his/her AcquiLine desktop can edit the PR unless the PR is in the creator's Archives folder (implying that it has been submitted to PD² and is now Read Only).

Any user who has a PR in the routing process on his/her AcquiLine desktop can modify the routing sheet/list, except that the PR can not be re-routed to the creator.

PRs cannot be dragged/moved from one folder to another on a user's AcquiLine desktop. AcquiLine automatically changes the location of a PR based on creating, approving, and submitting actions.

Action	AcquiLine placement of PR
User creates PR	PR is placed in creator's Drafts folder
User routes PR using a routing sheet/list	PR is placed in creator's Outbox folder, and an instance (copy) of the PR is placed in the Inbox folder of the first user on the routing sheet (an alert, if alerts are enabled by the SA, is sent to the receiving user)
User receiving PR approves the PR	PR remains in creator's Outbox folder, PR disappears from desktop of user who just approved it, and an instance (copy) of the PR is placed in the Inbox folder of the next user on the routing sheet (an alert, if alerts are enabled by the SA, is sent to the receiving user)
User receiving PR rejects PR	PR remains in creator's Outbox folder, PR remains in Inbox folder of user who just rejected it and cannot be returned to creator. This implies that the rejecting user must physically notify the creator that PR has been rejected (user may have already determined that from approval summary) and that the creator must modify, or the rejecting user

	could edit and continue routing or re-route. PR is also routed to the Inbox of the next user.
All users have approved PR	PR is placed in creator's Archives folder, and PR is placed in PD ² Inbox of the PD ² user selected by the routing sheet.
PD ² user returns PR to AcquiLine (rejects PR)	PR is placed in creator's Draft folder
PD ² user processes PR	PR remains in creator's Archives folder.

6.1.2 Proposed Routing SOP

Each AcquiLine user receiving a routed PR package should automatically and immediately view the approval history to ascertain the approval chain, personnel, and any comments.

Any AcquiLine user, other than the initiator/creator, who desires to print the PR should do so before approving the PR.

Since there is no electronic signature, approval is determined by the User Name approving the PR package. Therefore, users should not share passwords.

All AcquiLine approvers or rejecters should use the Comments field in the approval process to provide any applicable comments for the record. Examples could be: a funds certifier indicating a brief description, quantity, and total estimated cost; any approver stating known exceptions to any policy; a rejecter stating why PR was rejected, the PR Initiator stating the original PR number, PBO stating the PBO document number, etc.

An AcquiLine rejection may call for dialog and discussion outside of AcquiLine processing.

The last AcquiLine user on the routing sheet should have a process to ensure that the PR package is complete and accurate.

The initiator/creator should refresh and check his/her Outbox, Drafts, and Archives folders frequently to assure him/herself that the PR package is processing at a normal and acceptable rate.

PD² recipients of AcquiLine-submitted PR packages should be aware of the "funds certifiers" in applicable routing chains.

Effective use of the KO Notes feature of the PR will assist AcquiLine users in determining rationale for PR packages rejected by PD² recipients.

6.2 Acronyms

Acronym	Meaning
AMS	American Management Systems, Inc.
ASCII	American Standard Code for Information Interchange
BPR	Business Process Reengineering
BU	Business Unit
CBT	Computer Based Training
CCR	Central Contractor Registration
COGNOS	COGNOS Corporation, software developer/vendor of Impromptu and PowerPlay
COTS	Commercial Off-the-Shelf
DAMO/G6	Division Automation Management Office
DoD	Department of Defense
DODAAC	Department of Defense Activity Address Code
DOIM	Directorate of Information Management
DOR	Directorate of Readiness
DPW	Directorate of Public Works
DRM	Directorate of Resource Management
DSIC	Digital Systems International Corporation
DUNS	Dunn and Bradstreet Universal Numbering System
FAC	Federal Acquisition Circular
FAR	Federal Acquisition Regulation
FFP	Firm Fixed Price
FSC	Federal Supply Class
FTP	File Transfer Protocol
FY	Fiscal Year
GUI	Graphical User Interface
IA	Interface Agent
IDB	Interface Database
MIPR	Military Interdepartmental Purchase Request
NPS	Non-personal Services
NSN	National Stock Number

Acronym	Meaning
OLE	Object Linking and Embedding
PC	Personal Computer
PD ²	Procurement Desktop-Defense
POC	Point of Contact
PR	Purchase Request
RFP	Request for Proposal
RFQ	Request for Quotation
SA	System Administrator
SAACONS	Standard Army Automated Contracting System
SADBUS	Small And Disadvantaged Business Utilization Specialist
SF	Standard Form
SOW	Statement of Work
SPS	Standard Procurement System
SPS-I	Standard Procurement System Integration
SPS-IM	Standard Procurement System Interface Manager
TMP	Transportation Motor Pool
UDF	User-Defined File
UIC	Unit Identification Code (same as DODAAN)

7. ANNEXES

7.1 Memorandum, Headquarters United States Army Forces Command, 25 May 2000, subject: Property Request, Receipt, and Accountability Procedures under the Acquiline System.

7.2 Acquiline – Purchase Request User Guide, 21 July 2000.